6. Participant List

The Participant List Window is the main dialog for accessing all functions within the Clinic application. The first step is to identify the participant and/or household group with which the WIC staff member will work. The Clinic application provides the Participant List functions to assist the user in locating the desired participant record. The system performs the same way whether the person in the Participant List is an applicant or a participant, except where explicitly noted in the documentation.

6.1 Menus

The menus presented on the Participant List Window provide mouse and keyboard functionality to functions within the Clinic application. The list will consist of the following menus:

- File
- Participant List
- Activities
- Help

6.1.1 File Menu

This File menu contains menu items for invoking the various global features of the Clinic application. It will have a mnemonic of 'F'. When hovering over or selecting a file menu item, if a sub-list of items is available, the sub-list will automatically expand and be invoked. The File menu will invoke as follows:

- File
  - Waiting List
  - System Outputs
  - System Tools
  - Exit

6.1.1.1 Waiting List Menu Item

This menu item allows the user to invoke the Waiting List Management function. The menu item will be enabled when the File menu is active. It has a mnemonic of 'W'.

6.1.1.2 System Outputs Menu Item

This menu item allows the user to invoke the System Outputs function. This menu item will be enabled when the File menu is active. It has a mnemonic of 'O'.

6.1.1.3 System Tools Menu Item

This menu item allows the user to invoke the System Tools function. This menu item will be enabled when the File menu is active. It has a mnemonic of 'S'.

6.1.1.4 Exit Menu Item

This menu item allows the user to exit the Clinic application. This menu item will be enabled when the File menu is active. It has a mnemonic of 'X'.

6.1.2 File Menu Processes

6.1.2.1 Waiting List

Upon selecting the Waiting List menu item, the system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (WaitingList.View, Add or FullControl) to view the waiting list, the system invokes a standard error message with the text "You do not have the necessary permissions to View Waiting List. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke the Manage Waiting List dialog as described in Chapter 02 – Waiting List.

6.1.2.2 System Outputs

Upon selecting the System Outputs menu item, the system will expand the sub-menu as follows:

- System Outputs
  - Documents (mnemonic of 'D')
  - Labels (mnemonic of 'L')
  - Reports (mnemonic of 'R')

6.1.2.2.1 Documents

Upon selection of the Documents sub-menu item, the system will invoke the Generate Documents dialog described in Chapter 13 – System Outputs.

6.1.2.2.2 Labels

Upon selection of the Labels sub-menu item, then system will invoke the Generate Labels dialog as described in Chapter 13 – System Outputs.

6.1.2.2.3 Reports

Upon selection of the Reports sub-menu item, the system will invoke the Generate Reports dialog described in Chapter 13 – System Outputs.

6.1.2.3 System Tools

Upon selecting the System Tools menu item, the system will expand the sub-menu as follows:

- System Tools
  - Clear On-Site List (mnemonic of 'O')
  - Change Password (mnemonic of 'P')
  - Select Clinic (mnemonic of 'C')
  - Set Default Printers (mnemonic of 'D')

6.1.2.3.1 Clear On-Site List

Upon selection of the Clear On-Site List sub-menu item, the system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (On-Site Group.FullControl) to clear the on-site list, the system invokes a standard error message with the text "You do not have the necessary permissions to Clear On-site List. Please see the supervisor."

If the user does have the appropriate permissions, the system will clear the on-site list by deleting the Member.OnPremisesTime for the selected AgencyID and ServiceSiteID.

6.1.2.3.2 Change Password

Upon selection of the Change Password sub-menu item, then system will invoke the Change Password dialog as described in *Security*.

6.1.2.3.3 Select Clinic

Upon selection of the Select Clinic sub-menu item, the system will invoke the Select Clinic of Operation dialog described in *System Tools*

6.1.2.3.4 Set Default Printers

Upon selection of the Set Default Printers sub-menu item, the system will invoke the Default Printers dialog as described in as described in Common Interface Panels *Chapter S - System Tools*

6.1.2.4 Exit

Upon selection of the Exit menu item, the system will close and exit the Clinic Application.

If the Exit menu item is selected and the user has an open folder where updates are being made, the system will invoke the standard edits as defined in Chapter 09 – Participant Folder.

6.1.3 Participant List Menu

This menu contains menu items that allow the user to access functions of the participant list. It will have a mnemonic of 'P'. The menu will be enabled when the Participant List Window is active. The Participant List menu will be displayed as follows:

- Participant List
    - Toggle Applicant/Participant On-site
    - Schedule Appointment
    - Mark Appointment as Kept
    - Create New Member
    - Create New Household
    - Manage Household EBA
    - Open Participant Folder

6.1.3.1 Toggle Applicant /Participant On-site Menu Item

This menu item allows the user to toggle whether the participant is considered to be on-site. This menu item will be enabled when 'On-site', 'Local' or 'Appointments for Today' is the current view of the participant list and an entry is selected in the Participant List grid. It has a mnemonic of 'T'.

This menu item will be disabled when the current view of the participant list grid is empty, when 'Statewide' is the current view of the participant list or when no entry is selected in the Participant List grid.

6.1.3.2 Schedule Appointment Menu Item

This menu item allows the user to schedule an appointment for a selected participant. This menu item will be enabled when 'On-site' or 'Local' is the current view of the participant list and an entry is selected in the Participant List grid. It has a mnemonic of 'S'.

This menu item will be disabled when the current view of the participant list grid is empty, when 'Statewide' or 'Appointments for Today' is the current view of the participant list or when no entry is selected in the Participant List grid.

6.1.3.3 Mark Appointment as Kept Menu Item

This menu item allows the user to indicate that the participant kept their appointment for today. The menu item will be enabled when 'Appointments for Today' is the current view and a participant record is selected in the list. It has a mnemonic of 'K'.

This menu item will be disabled when no selection is made or the current view is 'On-site', 'Local' or 'Statewide'.

6.1.3.4 Create New Member Menu Item

This menu item allows the user to create a new member within an existing household. The menu item will be enabled when the 'On-site', 'Local' or 'Appointments for Today' is the current view and a participant record is selected on the list. It has a mnemonic of 'M'.

This menu item will be disabled when no selection is made in the participant list or the current view is 'Statewide'.

6.1.3.5 Create New Household Menu Item

This menu item allows the user to create a new household within the system. This menu item will be enabled when the Participant List menu is active. It has a mnemonic of 'H'.

6.1.3.6 Manage Household EBA Menu Item

This menu item allows the user to Mange the Household EBA associated with the selected participant. This menu item will be enabled when the Participant List menu is active. It has a mnemonic of 'E'.

The menu item will be **disabled** when the dialog is active if the FI_ENABLE_DELIVERYSYSTEMTYPE_EBT business rule is set to "N" (No).

6.1.3.7 Open Participant Folder Menu Item

This menu item allows the user to open a participant's folder. The menu item will be enabled when the Participant List menu is active and a participant record is selected on the participant list. It has a mnemonic of 'P'.

This menu item will be disabled when the current view of the participant list grid is empty or when no entry is selected in the Participant List grid.

6.1.4 Participant List Menu Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Menu.

6.1.4.1 Toggle Participant as On-site

Upon selection of the Toggle Participant as On-site item, the system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (OnSiteGroup.Add or FullControl) to toggle a participant on-site, the system invokes a standard error message with the text "You do not have the necessary permissions to Mark Toggle Participant as On-Site. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke the Toggle Participant as On-site dialog.

6.1.4.2 Schedule Appointment

Upon selection of the Toggle Participant as On-site item, the system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (Appointments.Add or FullControl) to schedule an appointment, the system invokes a standard error message with the text, "You do not have the necessary permissions to schedule appointments. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke the Select Appointment to Schedule dialog described in Clinic *Chapter 08 - Appointment Scheduling*.

6.1.4.3 Mark Appointment as Kept

Upon selection of the Mark Appointment as Kept menu item, the system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (Appointment.Add or FullControl) to mark the participant's appointment as kept, the system invokes a standard error message with the text "You do not have the necessary permissions to Mark Appointment as Kept. Please see the supervisor."

Upon selection of the Mark Appointment as Kept menu item:

- If the selected appointment is not a group education class, the system will set the Appointment.AppointmentKept value to 'Y'. The contents of the Scheduled Appointments display grid will then be refreshed.
- If the selected appointment is a group education class, the system will set the ClassEnrollment.EnrollmentKept value to 'Y'. The contents of the Scheduled Appointments display grid will then be refreshed.

6.1.4.4 Create New Member

Upon selection of the Create New Member menu item, the system will check the permissions for the currently logged-on user. If the user does not have the appropriate permissions (Prescreening.Add) to create a new household member, the system invokes a standard error message with the text "You do not have the necessary permissions to create a new member. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the Applicant Prescreening dialog described in Chapter 07 - Initial Contact populating common demographic field information.

6.1.4.5 Create New Household

Upon selection of the Create New Household menu item, the system will check the permissions for the currently logged-on user. If the user does not have the appropriate permissions (Prescreening.Add) to create a new household, the system will invoke a standard error message with the text "You do not have the necessary permissions to create a new household. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the Applicant Prescreening dialog described in Chapter 07 - Initial Contact.

6.1.4.6 Manage Household EBA

Upon selection of the Manage Household EBA menu item, the system will check the permissions for the currently logged-on user. If the user does not have the appropriate permissions (EBT.Add) to issue EBT cards, the system will invoke a standard error message with the text "You do not have the necessary permissions to issue EBT. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the View Household EBT Account dialog described in Chapter 12 – Participant Changes

6.1.4.7 Open Participant Folder

Upon selection of the Open Participant Folder menu item, the system will check the permissions for the currently logged-on user to determine if they have at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Check Issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, Diet Intake History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications. If the user does not have any of the above permissions, the system will invoke a standard error message with the text "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor."

If the present view of the participant list is On-site, Clinic or Appointments for Today, the system will open the Participant Folder for the currently selected household member. The Participant Folder is described in *Chapter 09 - Participant Folder*.

If the present view of the participant list is Statewide and the participant is receiving services at another clinic, the system will invoke a standard confirmation message with the text "Do you want to transfer this participant to this clinic?" The options of Yes and No will be available. The No option is the default button. If the user selects No, the system will return to the Participant List Window. If the user selects Yes,

- Edits to display informational messages for transferring members between EBT enabled and disabled clinics:
- The system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (ParticipantTransfer.FullControl) to transfer a participant, the system invokes a standard error message with the text "You do not have the necessary permissions to Transfer a Participant. Please see the supervisor."
- If the user has the appropriate permissions, the system will update the clinic information for the selected participant to reflect the clinic of the user. The participant now belongs to their clinic. The system will then proceed to open the Participant Folder for the selected participant. The Participant Folder is described in *Chapter 09 - Participant Folder*.

Upon opening the participant folder, the system will check the permissions for the user logged-on to determine the permission level for Displaying Alerts as defined in Common Interface Panels – *Chapter C - Display Alerts for Household Member* - as well as the Alert type to display. The alerts will be displayed as follows:

- If the Alert is a protected alert and the user does not have the ProtectedAlert.View permission, the alert will not be displayed.
- If the Alert is a protected alert and the user does have the ProtectedAlert.View permission, the alert will be displayed

- If the Alert is a non-protected alert and the user does not have the Alert.View permission, the non-protected alert will not be displayed.
- If the Alert is non-protected alert and the user does have the Alert.View permission, the non-protected alert will be displayed
- If no alerts exist or the system determines the user does not have the permissions described, the Display Alerts dialog will be bypassed.

6.1.5 Activities Menu

This menu contains menu items that allow the user to perform functions on groups of participants. It will have a mnemonic of ‘A’. This menu will be enabled when the Participant List Window is active. The Activities menu will be displayed as follows:

- Activities
  - Work with On-site Group
  - View Appointments for Date
  - Reschedule Block of Appointments
  - View Participant Transfer History
  - Food Instrument Disposition
  - EBT Food Instrument Disposition
  - Peer Counselor Item Issuance History
  - Missed Appointments Follow-up
  - Record Replacement Item

6.1.5.1 Work with On-site Group Menu Item

This menu item allows the user to perform functions for the group of participants who are marked as on-site. This menu item will be enabled when the Activities menu is active. The menu item has a mnemonic of ‘W’.

6.1.5.2 View Appointments for Date Menu Item

This menu item will allow the user to view the appointments scheduled at a specific clinic on a specific date. The menu item will be enabled when the Activities menu is active. It will have a mnemonic of ‘D’.

6.1.5.3 Reschedule Block of Appointments Menu Item

This menu item will allow the user to reschedule a block of appointments to another date, time, and/or clinic. The menu item will be enabled when the Activities menu is active. It will have a mnemonic of ‘R’.

6.1.5.4 View Participant Transfer History Menu Item

This menu item will allow the user to view the transfer history for selected participants. The menu item will be enabled when the Activities menu is active. It will have a mnemonic of 'V'.

6.1.5.5 Food Instrument Disposition Menu Item

This menu item will allow the user to review the current status of all food instruments that have been processed by the system. The menu item will be enabled when the Activities menu is active. It will have a mnemonic of 'F'.

6.1.5.6 Peer Counselor Item Issuance History Menu Item

This menu item will allow the user to view the breastpump issuance history for the breastfeeding counselors. The menu item will be enabled when the Activities menu is active. It will have a mnemonic of 'T'.

6.1.5.7 Missed Appointments Follow-up Menu Item

This menu item will allow the user to view a list of participants who missed their scheduled appointment. The menu item will be enabled when the Activities menu is active. It will have a mnemonic of 'I'.

6.1.5.8 Record Replacement Item Menu Item

This menu item will allow the user to record that a replacement item was received from the manufacturer. The menu item will be enabled when the Activities menu is active. It will have a mnemonic of 'P'.

6.1.6 Activities Menu Processes

6.1.6.1 Work with On-site Group

Upon selection of the Work with On-site Group menu item, the system will check the permissions of the currently logged-on user to determine if they have the appropriate permissions (OnSiteGroup.View, Add or FullControl) to view the On-Site Group list. The system will then determine if the user has Add or FullControl level access for any of the following features; WIC Check Issuance, Farmers Market Check Issuance, or Nutrition Education. If the user does not have the OnSiteGroup.View permissions, the system will invoke a standard error message with the text "You do not have the necessary permissions to view On-site Group. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the Work with On-site Group dialog described later in this document.

6.1.6.2 View Appointments for Date

Upon selection of the View Appointments for Date menu item, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Appointment.View, Add or FullControl) to view the appointments scheduled for a specific date at a particular clinic within the agency the user indicated when logging onto the system, the system will invoke a standard error message with the text "You do not have the necessary permissions to view appointments for date. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the View Appointments for Date dialog described in *Chapter 08 - Appointment Scheduling*.

6.1.6.3 Reschedule Block of Appointments

Upon selection of the Reschedule Block of Appointments menu item, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Appointment.FullControl) to schedule appointments, the system will invoke a standard error message with the text "You do not have the necessary permissions to reschedule a block of appointments. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the Reschedule Block of Appointments dialog described in Chapter 08 - Appointment Scheduling.

6.1.6.4 View Participant Transfer History

Upon selection of the View Participant Transfer History Menu Item, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (ParticipantTransfer.View or FullControl) to view participant transfer history, the system will invoke a standard error message with the text "You do not have the necessary permissions to View Participant Transfer History. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke the View Participant Transfer History dialog as described in this document.

6.1.6.5 Food Instrument Disposition

Upon selection of the Food Instrument Disposition menu item, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (CheckIssuance.View, Add or FullControl) to view food instruments, the system will invoke a standard error message with the text "You do not have the necessary permissions to View Food Instrument Disposition. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke the Food Instrument Disposition dialog described in *Chapter 03 – Food Instrument Disposition*.

6.1.6.6 Peer Counselor Item Issuance History

Upon selection of the Peer Counselor Item Issuance History menu item, the system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (BreastfeedingItemIssuance.View, Add or FullConrol) to view breastpump issuance history, the system invokes a standard error message with the text "You do not have the necessary permissions to View Breastpump Issuance History. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke the Breastfeeding Counselor Item Issuance History dialog described in *Chapter P – Breastpumps, Breastfeeding Kits and Supplies*.

6.1.6.7 Missed Appointments Follow-up

Upon selection of the Missed Appointments Follow-up menu item, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Appointment.FullControl) to schedule appointments, the system will invoke a standard error message with the text "You do not have the necessary permissions to view Missed Appointment Follow-up. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the Missed Appointments Follow-up dialog described in *Chapter 08 - Appointment Scheduling*.

6.1.6.8 Record Replacement Item

Upon selection of the Record Replacement Item menu item, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (BreastfeedingItemIssuance.Add or FullControl) to update breastpump information, the system will invoke a standard error message with the text "You do not have the necessary permissions to update breastpump information. Please see the supervisor."

If the user has the appropriate permissions to perform the Record Replacement Item function, the system will invoke the Record Replacement Item dialog described in *Chapter 08 - Participant Search, Folder and Summary(SO).doc*.

6.1.7 Help Menu

The Help menu is provided to assist the user in finding answers to questions about how to use the Clinic application. This menu item will be enabled when the File menu is accessible. It has a mnemonic of 'H'. The Help menu will be displayed as follows:

- Help
  - Help on Screen
  - WIC Help Topics
  - About

6.1.7.1 Help on Screen

This menu item will allow the user to view panel-level help for the currently invoked screen. This menu item will be enabled when the Help Menu is active. This menu item has a mnemonic of 'S' and a shortcut key of 'F1'.

6.1.7.2 WIC Help Topics Menu Item

This menu item will allow the user to view a list of help topics for the WIC system. This menu item will be enabled when the Help Menu is active. It has a mnemonic of 'W'

6.1.7.3 About WIC Menu Item

This menu item allows the user to view information about the software. This menu item will be enabled when the Help Menu is active. It has a mnemonic of 'A'

6.1.8 Help Menu Processes

6.1.8.1 Help on Screen

Upon selection of the Help on Screen menu item, the system will invoke the Clinic application panel level help. This function is also invoked when pressing the F1 key.

6.1.8.2 WIC Help Topics

Upon selection of the WIC Help Topics menu item, the system will invoke the Help Topics: Clinic Help System at the Index tab of the help function.

6.1.8.3 About WIC

Upon selection of the About WIC menu item, the system will invoke the About WIC application information dialog.

6.1.9 Toolbar

This Toolbar contains items for invoking the various features of the Clinic application.

Figure 1 - Participant List Toolbar

6.1.9.1 Manage Waiting List Toolbar Button

This toolbar button allows the user to manage the waiting list. It will be enabled when the Participant List is active. It has a tool tip text of "Manage Waiting List".

Figure 2 - Manage Waiting List Toolbar Button

6.1.9.2 System Outputs Toolbar Button

This toolbar button allows the user to invoke the System Outputs function. It will be enabled when the Participant List is active. It has a tool tip text of "System Outputs".

Figure 3 - System Outputs Toolbar Button

6.1.9.3 System Tools Toolbar Button

This toolbar button allows the user to invoke the System Tools function. It will be enabled when the Participant List is active. It has a tool tip text of "System Tools".

Figure 4 - System Tools Toolbar Button

6.1.9.4 Exit Toolbar Button

This toolbar button allows the user to exit the Clinic application. It will be enabled when the Participant List is active. It has a tool tip text of "Exit Clinic Application".

Figure 5 - Exit Toolbar Button

6.1.9.5 Toggle Participant On-site Toolbar Button

This toolbar button allows the user to toggle the participant on-site. This toolbar button will be enabled when 'On-site', 'Local' or 'Appointments for Today' is the current view and a participant record is selected on the participant list. It has a tool tip text of "Toggle Applicant/Participant On-site".

Figure 6 - Toggle Participant On-site Toolbar Button

6.1.9.6 Schedule Appointment Toolbar Button

The toolbar button will be enabled when the Participant Folder is active. This toolbar button will be enabled when the ‘On-site’ or ‘Local’ is the current view and a participant record is selected on the participant list. It has a tool tip text of “Schedule Appointment”.

Figure 7 - Schedule Appointment Toolbar Button

6.1.9.7 Create New Member Toolbar Button

This toolbar button allows the user to create a new member within an existing household. This toolbar button will be enabled when the ‘On-site’, ‘Local’ or ‘Appointments for Today’ is the current view and a participant record is selected on the participant list. It has a tool tip text of “Create New Member”.

Figure 8 - Create New Member Toolbar Button

6.1.9.8 Create New Household Toolbar Button

This toolbar button allows the user to create a new household within the system. This toolbar button will be enabled when the Participant List Window is active. It has a tool tip text of “Create New Household”.

Figure 9 - Create New Household Toolbar Button

6.1.9.9 Open Participant Folder Toolbar Button

This toolbar button allows the user to open a participant’s folder. This toolbar button will be enabled when the Participant List Window is active and a participant record is selected on the participant list. It has a tool tip text of “Open Participant Folder.”

Figure 10 - Open Participant Folder Toolbar Button

6.1.10 Toolbar Processing

6.1.10.1 Waiting List

Upon selecting the Waiting List toolbar button, the system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (WaitingList.View, Add or FullControl) to view the waiting list, the system invokes a standard error message with the text "You do not have the necessary permissions to View Waiting List. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke the Manage Waiting List dialog as described in *Chapter 02 – Waiting List*.

6.1.10.2 System Outputs

Upon selecting the System Outputs toolbar button, the system will expand the sub-menu as follows:

- System Outputs
  - Documents (mnemonic of 'D')
  - Labels (mnemonic of 'L')
  - Reports (mnemonic of 'R')

6.1.10.2.1 Documents

Upon selection of the Documents sub-menu item, the system will invoke the Generate Documents dialog described in *Chapter 13 – System Outputs*.

6.1.10.2.2 Labels

Upon selection of the Labels sub-menu item, then system will invoke the Generate Labels dialog as described in *Chapter 13 – System Outputs*.

6.1.10.2.3 Reports

Upon Selection of the Reports sub-menu item, the system will invoke the Generate Reports dialog described in *Chapter 13 – System Outputs*.

6.1.10.3 System Tools

Upon selecting the System Tools toolbar button, the system will expand the sub-menu as follows:

- System Tools
    - Clear On-Site List (mnemonic of 'O')
    - Change Password (mnemonic of 'P')
    - Select Clinic (mnemonic of 'C')
    - Set Default Printers (mnemonic of 'D')

6.1.10.3.1 Clear On-Site List

Upon selection of the Clear On-Site List sub-menu item, the system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (OnSiteGroup.FullControl) to clear the on-site list, the system invokes a standard error message with the text "You do not have the necessary permissions to Clear On-site List. Please see the supervisor."

If the user does have the appropriate permissions, the system will clear the on-site list by deleting the Member.OnPremisesTime for the selected AgencyID and ServiceSiteID.

6.1.10.3.2 Change Password

Upon selection of the Change Password sub-menu item, the system will invoke the Set Password dialog as described in Application Administration - *Chapter 2 – Security*.

6.1.10.3.3 Select Clinic

Upon selection of the Select Clinic sub-menu item, the system will invoke the Select Clinic of Operation dialog described in Common Interface Panels *Chapter S - System Tools*

6.1.10.3.4 Set Default Printers

Upon selection of the Set Default Printers sub-menu item, the system will invoke the Default Printers dialog as described in as described in Common Interface Panels *Chapter S - System Tools*

6.1.10.4 Exit

Upon selection of the Exit toolbar button, the system will close and exit the Clinic Application.

If the Exit toolbar button is selected and the user has an open folder where updates are being made, the system will invoke the standard edits as defined in *Chapter 09 – Participant Folder*.

6.1.10.5 Toggle Participant On-site

Upon selection of the Toggle Participant On-site toolbar button

The system will check the permissions for the logged-on user. If the user does not have the appropriate permissions (OnSiteGroup.Add or FullControl) to toggle a participant on-site, the system invokes a standard error message with the text "You do not have the necessary permissions to Mark Toggle Participant as On-Site. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke the Toggle Participant as On-site dialog.

6.1.10.6 Schedule Appointment

Upon selection of the Schedule Appointment toolbar button, if the user does not have the appropriate permissions (Appointments.Add or FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to schedule appointments. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the Select Appointment to Schedule dialog described in Clinic *Chapter 08 - Appointment Scheduling*.

6.1.10.7 Create New Member

Upon selection of the Create New Member toolbar button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Prescreening.Add) to create a new household member, the system will invoke a standard error message with the text "You do not have the necessary permissions to create a new member. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the Applicant Prescreening dialog described in *Chapter 07 - Initial Contact* populating common demographic field information.

6.1.10.8 Create New Household

Upon selection of the Create New Household toolbar button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Prescreening.Add) to create a new household, the system will invoke a standard error message with the text "You do not have the necessary permissions to create a new household. Please see the supervisor."

If the user has the appropriate permissions, the system will invoke the Applicant Prescreening dialog described in Applicant Prescreening dialog described in *Chapter 07 - Initial Contact* with all fields set to initial defaults.

6.1.10.9 Open Participant Folder

Upon selection of the Open Participant Folder toolbar button, the system will check the permissions for the currently logged-on user to determine if they have at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Check Issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, Diet Intake History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications When the user does not have the any above listed permissions, the system will invoke a standard error message with the text "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor."

If the user has at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Check Issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, Diet Intake History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications and the present view of the participant list is 'On-site', 'Local' or 'Appointments for Today' the system will invoke the Participant Folder for the currently selected household member. The Participant Folder is described in *Chapter 09 - Participant Folder*.

If the user has at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Check Issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, Diet Intake History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications and the present view of the participant list is 'Statewide' and the participant is receiving services at another agency, the system will invoke a standard confirmation message with the text "Do you want to transfer this participant to this clinic?" The options of Yes and No will be available. If the user selects No, the system will return to the Participant List Window. If the user selects Yes, the system will change the agency and clinic information for the selected participant to reflect the agency and clinic of the user. The participant now belongs to the clinic. The system will proceed to open the Participant Folder for the selected participant.

The system will check the permissions for the user logged-on to determine the permission level for Displaying Alerts as defined in Common Interface Panels – *Chapter C - Display Alerts for Household Member* - as well as the Alert type to display. The alerts will be displayed as follows:

- If the Alert is a protected alert and the user does not have the ProtectedAlert.View permission, the alert will not be displayed.
- If the Alert is a protected alert and the user does have the ProtectedAlert.View permission, the alert will be displayed
- If the Alert is a non-protected alert and the user does not have the Alert.View permission, the non-protected alert will not be displayed.
- If the Alert is non-protected alert and the user does have the Alert.View permission, the non-protected alert will be displayed
- If no alerts exist or the system determines the user does not have the permissions described, the Display Alerts dialog will be bypassed.

6.2 Participant List

The initial dialog of the WIC system allows the user to reach all functions of the system, including the Participant Folder, WIC Certification, Waiting List Management, System Outputs and System Tools. The Participant List creates the foundation of the WIC Clinic application. This document describes the various functions for searching and displaying the participant list. The Participant list can be sorted and displayed in several ways.

This criterion is the current view of the participant list. The current view is initially set according to the defaults for the user currently logged into the system. When the Search button is selected, the current view of the Participant List will refresh to the value selected in the 'Where to Search' radio button group.

The user can view the 'Statewide' database to search all 'Local' databases for all WIC participants. This allows the user to transfer participant information between clinics.

The title bar and columns of each dialog will change to reflect the selected View.

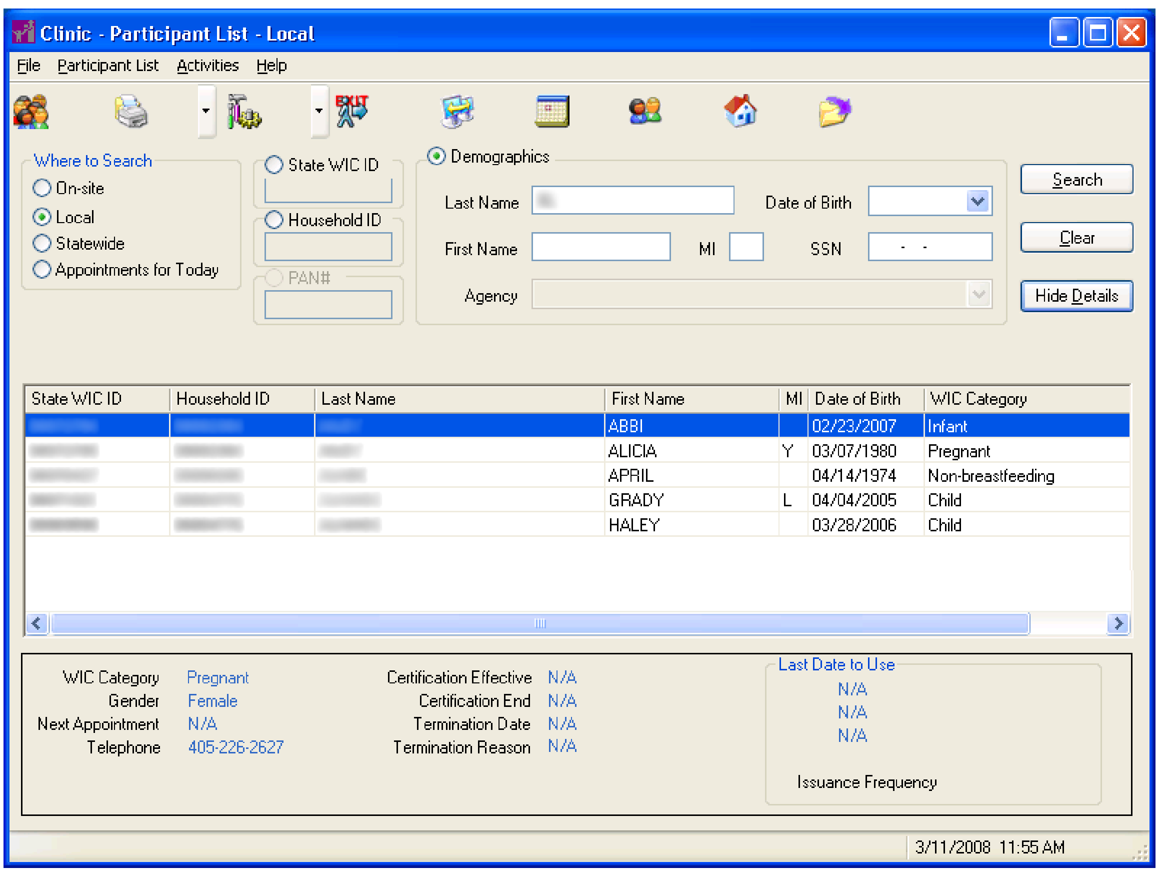


Figure 11 - Participant List – (Details Hidden)

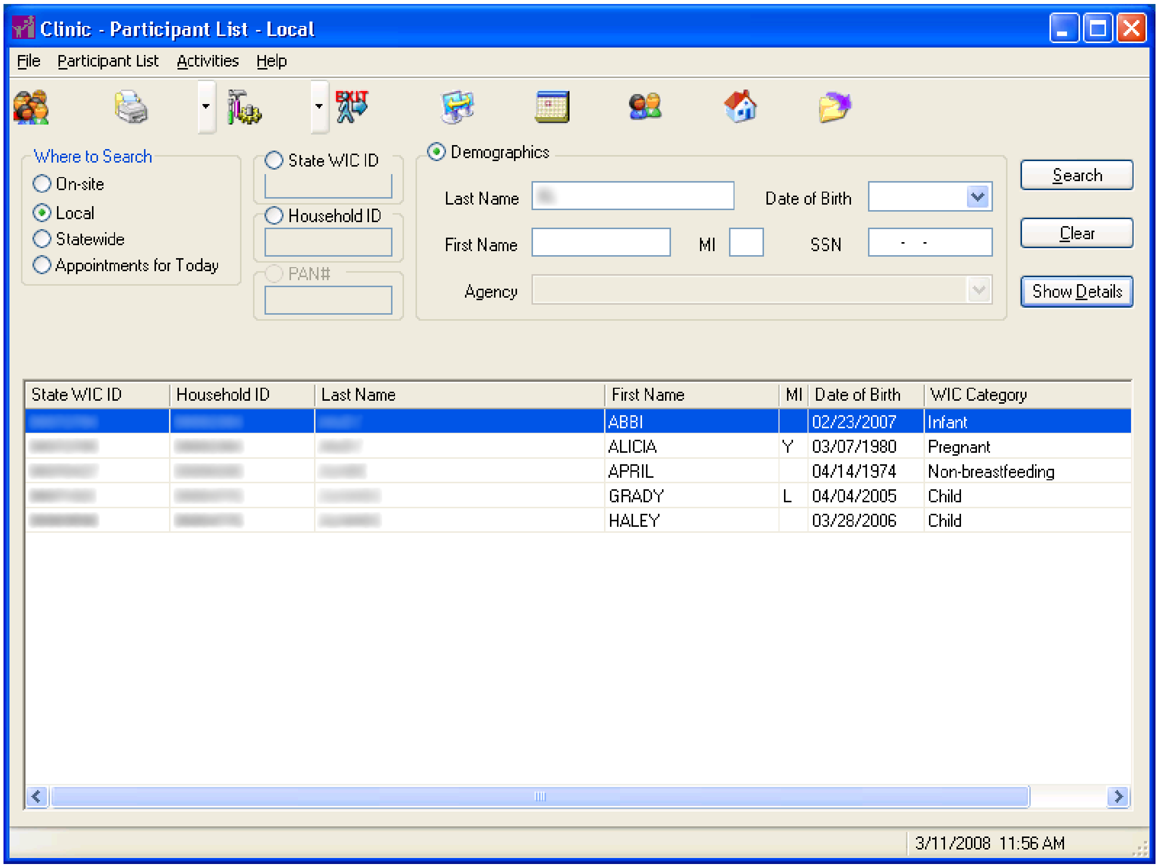


Figure 12 - Participant List - (Details Shown)

6.2.1 Controls

This section describes the behavior of the controls on the Participant List Window.

6.2.1.1 Where to Search Radio Button Group

This control allows the user to indicate which view to search for a participant. The radio button group consists of the following buttons:

- On-site
- Local
- Statewide
- Appointments for Today

The radio button group will be enabled when the dialog is active. The initially selected radio button from this group will correspond to the currently selected view of the participant list. Selection of the 'Statewide' radio button will search all Clinics. One radio button in the group must be selected.

When selecting either the 'Local' or 'Statewide' radio button, additional search criteria is required.

When selecting either the 'On-site' or 'Appointments for Today' radio button, additional search criteria is optional. State WIC ID is not required even though the radio button defaults to "selected".

6.2.1.2 State WIC ID Radio Button and Masked Edit Box

The radio button is enabled when the Participant List is active. When this radio button is selected, the State WIC ID masked edit box will be enabled. Otherwise the masked edit box will be disabled. The masked edit box will only allow entry of alphanumeric characters. The mask for the box will be "########". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

6.2.1.3 Household ID Radio Button and Masked Edit Box

The radio button is enabled when the Participant List is Active. When this radio button is selected, the Household ID masked edit box will be enabled. Otherwise, the masked edit box will be disabled. The masked edit box will only allow entry of alphanumeric digits. The mask for the box will be "########". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

6.2.1.4 PAN# Radio Button and Masked Edit Box

The PAN# (EBT card Primary Account Number) button is enabled when the Participant List is Active. The control will be **disabled** and blank when the dialog is active if the FI_ENABLE_DELIVERYSYSTEMTYPE_EBT business rule is set to "N" (No). When this radio button is selected, the PAN Number masked edit box will be enabled. Otherwise, the masked edit box will be disabled. The masked edit box will only allow entry of digits. The mask for the box will be "####################". If less than the maximum number of twenty (20) digits is entered into the masked edit box, it will be padded with preceding zeros. Multiple PAN numbers may be linked to the Household EBT Account, since cards become deteriorated or are lost. The search will result in the household linked to the card number.

The EBTCARDPANNBR is in the EBTCardAcct table which also has the EBAccountID. The EBAccountID can be used to access the EBAccount table that also contains the HouseholdID. Return all participants for the household on the EBT account.

6.2.1.5 Demographics Radio Button

The radio button is enabled when the Participant List is Active. When this radio button is selected, the demographic controls become enabled. Otherwise, the Demographic controls will be disabled.

6.2.1.6 Demographics - Last Name Text Box

This control allows the user to enter a complete or partial last name as search criteria. The text box will be enabled when the Demographic radio button is selected. The maximum size of this control will be twenty-five (25) characters. Only characters A-Z, {space}, and the following characters (**' . , -**) are allowed. It will convert all entered characters to upper case.

6.2.1.7 Demographics - First Name Text Box

This control allows the user to enter a complete or partial first name as search criteria. The text box will be enabled when the Demographic radio button is selected. Only characters A-Z, {space}, and the following characters (**' . , -**) are allowed. It will convert all entered characters to upper case. The maximum size of this control will be twenty (20) characters.

6.2.1.8 Demographics - Middle Initial Text Box (MI)

This control allows the user to enter the middle initial as search criteria. The text box will be enabled when the Demographic radio button is selected. Only characters A-Z are allowed. It will convert all entered characters to upper case. The maximum size of this control will be one (1) character.

6.2.1.9 Demographics – SSN Masked Edit Box

This control allows the user to enter the social security number as search criteria. The masked edit box will be enabled when the Demographics radio button is selected. It will only allow the entry of numeric characters. The mask for the box will be "###-##-###".

6.2.1.10 Demographics – Date of Birth Masked Edit Box

This control allows the user to select the Date of Birth as search criteria. The masked edit box will be enabled when the Demographics radio button is selected. It will allow the entry of numeric characters. The mask for the box will be "##/##/####" to accept a date with a four digit year.

6.2.1.11 Agency Dropdown Box

The dropdown box will be disabled when the Participant List Window is active. Characteristics for the Agency dropdown are defined in Consistencies.

6.2.1.12 Search button

The Search button will be enabled when the Participant List Window is active. It will have a mnemonic of 'S'.

6.2.1.13 Clear button

The Clear button will be enabled when the Participant List Window is active. It will have a mnemonic of 'C'.

6.2.1.14 Show/Hide Details button

The Show/Hide button will be enabled when the Participant List Window is active. It will have a mnemonic of 'D'.

6.2.1.15 Participant List Grid (All Views)

This control allows the user to select the appropriate participant with which to work. Double-clicking on a participant's record in the grid will open the participant folder for the selected participant.

6.2.1.15.1 Grid Content

The grid content will vary depending on selection made in the 'Where to Search' radio button group:

6.2.1.15.1.1 The On-site View

In the '**On-site' view**, the participant list will be initially sorted by ascending On-site Time. The first entry will initially be selected.

The participant list grid will contain the following columns:

- On-site Time
- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category

6.2.1.15.1.2 The Local View

In '**Local**' view, the participant list will be initially sorted by Last Name, First Name and Middle Initial. The first entry will initially be selected. The participant list grid will contain the following columns:

- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category

6.2.1.15.1.3 The Statewide View

In the **'Statewide'** view, the participant list will be initially sorted by Last Name, First Name, and Middle Initial. The first entry will initially be selected. The participant list grid will contain the following columns:

- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category
- Gender
- Agency Number
- Clinic Number

6.2.1.15.1.4 The Appointments for Today View

In the **'Appointments for Today**' view, the participant list will be initially sorted by Appointment Time, Appointment Type, Last Name, First Name and Middle Initial. The first entry will initially be selected. The participant list grid will contain the following columns:

- Appointment Time (Appt Time)
- Appointment Type (Appt Type)
- Kept
- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category

- Resource

6.2.1.15.1.4.1 The Kept Column

The Kept column of the Participant List Grid displays a check box that indicates whether the participant has kept her appointment. The initial state of the check box for each participant displayed in the grid is determined as follows:

- If an appointment is not a group education class the system will check the Appointment.AppointmentKept value. If the value is 'Y', the check box will initially be selected. If the value is 'N', the check box will initially be cleared.
- If an appointment is a group education class the system will check the ClassEnrollment.EnrollmentKept value. If the value is 'Y', the check box will initially be selected. If the value is 'N', the check box will initially be cleared.

When a Kept check box is clicked, the system checks the permissions for the logged-on user as follows:

- If the user does not have the appropriate permissions (Appointment.Add or FullControl) to mark the participant’s appointment as kept or missed, the system invokes a standard error message with the text “You do not have the necessary permissions to update kept. Please see the supervisor.”
- If the user does have the appropriate permissions (Appointment.Add or FullControl), the system will allow the check boxes to be selected or cleared. When the state of any check box in the Kept column is changed, an Update Kept button is displayed.

6.2.1.15.1.4.1.1 Update Kept Button

The Update Kept button is hidden until the state of any check box in the Kept column is changed. After the state of a check box in the Kept column has changed, the Update Kept button is displayed above the Kept column and enabled.

This button is used to apply changes made to the check boxes in the Kept column.

6.2.1.16 Detail Panel - WIC Category Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the WIC Category at the most recent certification for the participant selected in the participant list. The value label will invoke the lookup value corresponding to the WIC-Status attribute of the MEMBER entity. It will invoke as read-only in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.17 Detail Panel - Gender Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the gender of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Gender attribute of the MEMBER entity. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.18 Detail Panel - Next Appointment Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the Next Appointment for the participant selected in the participant list. The value label will invoke the lookup value corresponding to the AppointmentDate attribute of the APPOINTMENT entity where AppointmentDate is equal to or greater than today's date and less than the AppointmentDate for any other appointment scheduled for the participant. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.19 Detail Panel - Telephone Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the primary telephone number for the household of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Telephone1 attribute of the HOUSEHOLD entity. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.20 Detail Panel - Certification Effective Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the effective date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEffectiveDate attribute of the CERTCONTACT entity. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.21 Detail Panel - Certification End Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the end date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEndDate attribute of the CERTCONTACT entity. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.22 Detail Panel - Termination Date Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the termination date for the participant selected in the participant list. If the Terminated attribute of the MEMBER entity is ‘Y’, the value of the Terminated-Date attribute of the MEMBER entity will be invoked. If the Terminated attribute of the MEMBER entity is not ‘Y’, the text “N/A” will be invoked. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.23 Detail Panel - Termination Reason Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the termination reason for the participant selected in the participant list. When a date is invoked in the Termination Date field, the value label will invoke the description from the ReferenceDictionary entity where attribute CATEGORY = ‘TERMREASON’ associated with the value of the Cert-Termination-Reason attribute of the CERT-CONTACT entity. If “N/A” is invoked in the Termination Date field, the value label will invoke “N/A”. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.24 Detail Panel - Last Date to Use Group Box

This group box is displayed when the Show Details panel is active. This group box contains the Last Use Date printed on the WIC checks issued to the selected participant. It also allows the user to view the issuance frequency for the selected participant.

6.2.1.24.1 Detail Panel - Last Date to Use Value Labels

This control is displayed when the Show Details panel is active. This control allows the user to view the Last Use Date printed on the checks issued to the selected participant. The value label will invoke the value of the Last-Check-LDTU attribute of the MEMBER entity. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.1.24.2 Detail Panel - Issuance Frequency Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the issuance frequency of the participant selected in the participant list. The value label will invoke the value of the look up value of the IssuanceFrequency attribute of the MEMBER entity. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

6.2.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Participant List Window.

6.2.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to "Participant List"

The Where to Search radio button group will default to the value set for the StaffMember.DefaultsListView. If not set, the value will default to "Local"

The State WIC ID radio button will initially be selected.

The following controls are initially blank (and disabled where indicated in parenthesis)

- State WIC ID radio button
- State WIC ID masked edit box
- Household ID radio button

- Household ID masked edit box (disabled)
- Demographics radio button
- Last Name text box (disabled)
- First Name text box (disabled)
- MI text box (disabled)
- Date of Birth masked edit box (disabled)
- SSN masked edit box(disabled)
- Agency dropdown (disabled)

The Participant List grid is initially blank

The Show Details panel is initially hidden

6.2.2.2 Edits for Search Criteria

Upon selection of the Search button, when the State WIC ID radio button is selected and the Where to Search selection is either Local or Statewide and an entry is not made in the State WIC ID field, the system will invoke a standard error message with the text, "An entry is required for the State WIC ID." The State WIC ID is not required if the Where to Search selection is either On-site or Appointments for today even though the State WIC ID radio button is selected by default.

When the Household ID radio button is selected and an entry is not made in the Household ID field, the system will invoke a standard error message with the text "An entry is required for the Household ID."

When the PAN# radio button is selected and an entry is not made in the PAN # field, the system will invoke a standard error message with the text "An entry is required for the PAN #."

When the Demographics radio button is selected, an entry is not made in at least one of the following controls:

- Last Name text box
- First Name text box
- Middle Initial text box
- Date of Birth masked edit box
- SSN
- Agency (when enabled)

The system will invoke a standard error message with the text "An entry is required for at least one of the Demographics fields to perform a search."

If an invalid date is entered in the Date of Birth masked edit box, the system will invoke a standard error message with the text "Invalid date entered."

If the value entered into the Date of Birth masked edit box is greater than the system date the system will invoke a standard error message with the text "Date entered must be less than or equal to today's date."

6.2.2.3 Display Participant List

Upon successful completion of the above listed edits, if a value exists, the system will perform a soft search combined with a Soundex search on the 'Last Name' and 'First Name' fields. (For example, if the user performs a search on the Last Name of 'PATTER', a combined Soundex and soft search would yield results similar to the following: PADDER, PADDERSON, PATTER, PATTERSON, POTTER, POTTERSON, POTTERS.)

The system will provide a hard search for the remaining controls.

The system will display all records found meeting the criteria in the Participant List Grid.

The title of the Participant List Window will be set to "Participant List - {name of view} (subset)", where {name of view} is On-site, Local, Statewide, or Appointments for Today based on the radio button selected from the Where to Search radio button group. The first record in the list will be initially selected.

If no records are found that meet the search criteria, the system will invoke a standard message with the text "No participant matching your search criteria could be found " Upon dismissal of the message, the system will then return to the Participant List Window preserving the previously entered search criteria.

6.2.2.4 Update Kept Button

Upon clicking the Update Kept button, the system will check the current state of the Kept check box for each participant included in the Participant List grid, and if the value has changed, the system will update the database as follows:

- If the appointment is not a group education class, the system will set the Appointment.AppointmentKept value to 'Y' if the check box has been selected and will set the Appointment.AppointmentKept value to 'N' if the check box has been cleared.
- If the appointment is a group education class, the system will set the ClassEnrollment.EnrollmentKept value to 'Y' if the check box has been selected and will set the ClassEnrollment.EnrollmentKept value to 'N' if the check box has been cleared.

6.2.2.5 Clear

Upon selection of the Clear button, the system will clear and reset all controls on the Participant List Window.

6.2.2.6 Show Details

Upon selection of the Show Details button, the system will display the details for the selected participant in the Show Details panel.

6.2.2.7 Hide Details

Upon selection of the Hide Details button, the system will hide the Show Details panel.

6.2.2.8 Transfer Participant (Statewide View)

While in the Statewide view of the participant list, if the user attempts to open a folder for a participant who is receiving services from another agency/clinic, the system will check the permissions for the currently logged-on user. If the user does not have the appropriate permissions (ParticipantTransfer.FullControl) to transfer participants , the system will invoke a standard error message with the text "You do not have the necessary permissions to transfer a participant. Please see the supervisor."

If the user does have the appropriate permissions, the system will invoke a standard confirmation message with the text "Do you want to transfer this participant to this clinic?" The options of Yes and No will be available. If the user selects No, the system will return to the Participant List Window. If the user selects Yes, the system will change the agency and clinic information for the selected participant to reflect the agency and clinic of the user. The participant now belongs to the clinic.

The system will check the permissions for the currently logged-on user to determine if they have at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Check Issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, Diet Intake History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications. When the user does not have any of the above permissions, the system will invoke a standard error message with the text "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor".

If the user does have at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Check Issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, Diet Intake History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications, the system will proceed to open the Participant Folder for the selected participant as described in Open Participant Folder (On-site, Clinic and Appointments for Today Views).

6.2.2.9 Saving the Data

Upon clicking the Update Kept button, the system will update the Appointment-Kept attribute of the APPOINTMENT entity to match the selected or cleared state of each check box in the Kept column.

6.2.2.10 Data Map

There are no updateable controls on this dialog; therefore no data is saved to the database.

6.3 Toggle Applicant/Participant On-site

The Toggle Applicant/Participant On-site dialog allows the user to indicate whether an applicant or participant is on-site. Marking an applicant or participant as on-site allows the system to subset the list of applicants or participants on certain functions to only those who are present at all of the clinic's within the agency. The system will automatically remove the participant as marked on-site if food instruments are issued to the participant. However, if a participant does not receive food instruments the user must manually remove them from the on-site list. The Toggle Applicant/Participant On-site dialog is invoked from either the Participant List View or from within a Participant folder in response to the following user actions:

- Selection of the Toggle Applicant/Participant On-site menu item from the Participant List menu described previously in this document.
- Selection of the Toggle Applicant/Participant On-site toolbar button from the Participant List toolbar described previously in this document.

Figure 13 - Toggle Applicant/Participant On-site Dialog

6.3.1 Controls

This section describes the behavior of the controls on the Toggle Applicant/Participant On-site dialog.

6.3.1.1 Applicant/Participant is On-site Check Box

This control allows the user to indicate that the applicant or participant is currently on-site. The check box will be enabled when the Toggle Applicant/Participant On-site dialog is active.

6.3.1.2 OK Button

This control allows the user to save any changes made to the applicant or participant and exit the Toggle Applicant/Participant On-site dialog. The OK button will be enabled when the Toggle Applicant/Participant On-site dialog is active. Characteristics of the OK button are defined in *Consistencies*.

6.3.1.3 Cancel Button

This control allows the user to discard any changes made to the applicant or participant and exit the Toggle Applicant/Participant On-site dialog. The Cancel button will be enabled when the Toggle Applicant/Participant On-site dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

6.3.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Toggle Applicant/Participant On-site dialog.

6.3.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to "Toggle Applicant/Participant On-site"

The Applicant/Participant is On-site check box will initially be blank.

If the Member.OnPremisesTime is valued, the Applicant/Participant is On-site check box will be checked.

6.3.2.2 Edits

All values on this dialog are considered legitimate.

6.3.2.3 Saving the Data

Upon selection of the OK button, if the Applicant/Participant is On-site check box is checked the system will record the current system time as the Member.OnPremisesTime.

When an alert exists for the participant, or an alert exists for any member of the participant household that is flagged to appear for all members of the household, the system will automatically invoke the Display Alerts dialog as described in Chapter C - Display Alerts for Household Member.

When a CPA Review alert exists for the participant, the system will then automatically invoke the CPA Review dialog as described in Chapter F – CPA Review. After invoking any alerts and review information, the system will return to the Participant List.

If the Applicant/Participant is On-site check box is not marked when the OK button is pressed, the system will delete the Member.OnPremisesTime.

The system will return to the calling dialog.

6.3.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Toggle Applicant/Participant On-site dialog without saving information and return to the calling dialog.

6.3.2.5 Data Map

Control Label	**Entity**	**Attribute**	**Business Rule**
Applicant/Participant is On-site	Member	OnPremisesTime	

6.4 Work with On-site Group

The Work with On-site Group dialog displays all participants within a household for each participant that has been marked as On-site. All household members will be displayed regardless of their own On-site status.

This dialog allows the user to apply functions to a group of participants listed as on-site and all of the members of their household. The Work with On-site Group dialog is invoked when the user selects the Work with On-site Group menu item from the Activities menu.

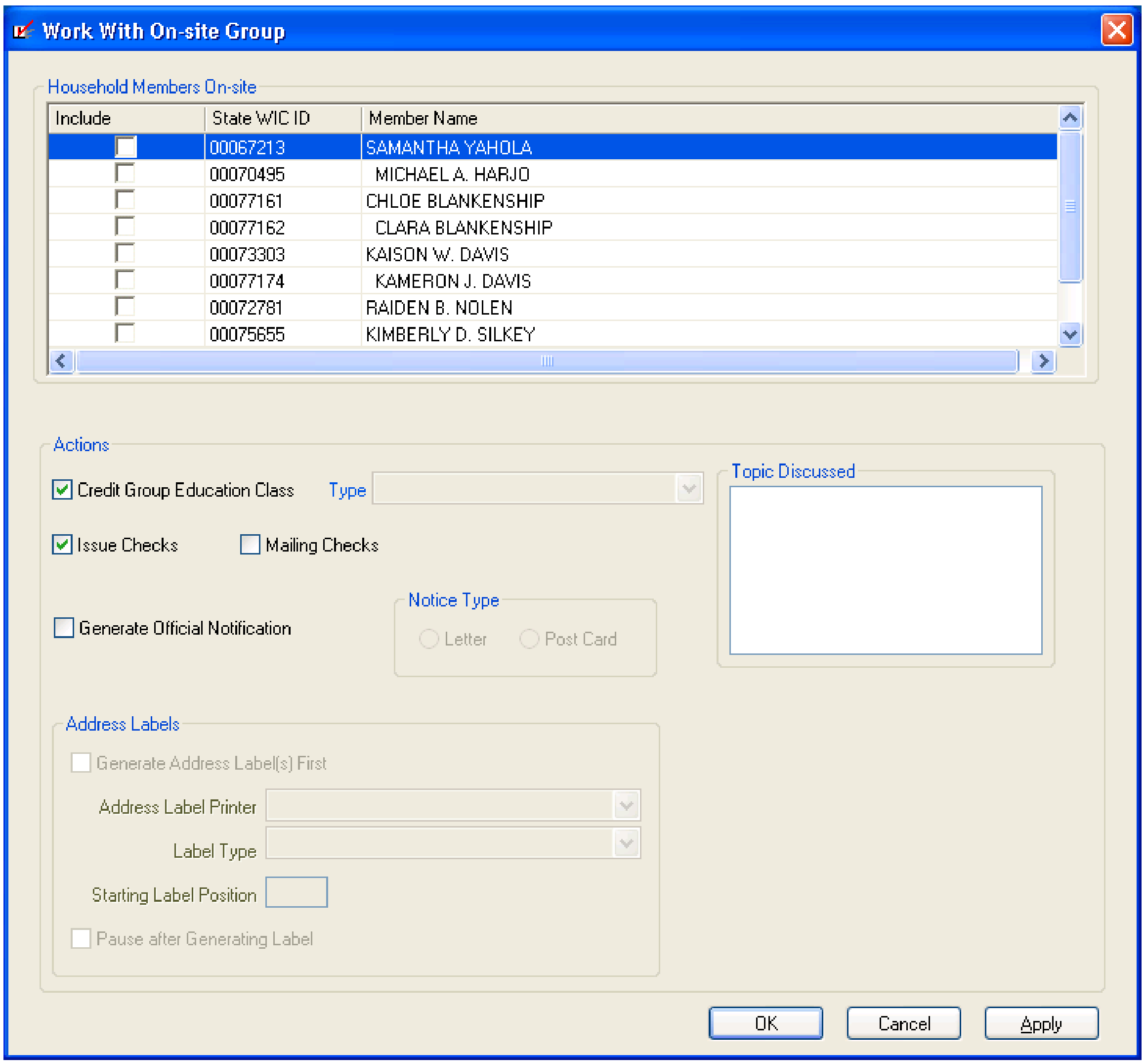


Figure 14 - Work with On-site Group Dialog

6.4.1 Controls

This section describes the behavior of the controls on the Work with On-site Group dialog.

6.4.1.1 Household Members On-site Grid

This control allows the user to select a target group from the participants that have been marked as on-site.

The grid will be enabled when the Work with On-site Group dialog is active. The grid consists of the following columns:

- Include
- State WIC ID
- Member Name

The grid will display an entry for each participant (Member.StateWICID) (Member.FirstName Member.MiddleInitial. Member.LastName) who has a completed certification or a certification attempt, and has been marked as on-site. (Member.OnPremisisTime) The grid will sort first by Household ID then second by member Date of Birth. The grid list cannot be re-sorted. If more than one participant of a household is marked on-site, the oldest participant will be displayed first and the others will be indented slightly to show the household relationship. A check mark may be placed in the Include column of each record to include the participant in the specified activities. The values in the remaining columns are read-only.

6.4.1.2 Credit Group Education Class Check Box

This control allows the user to credit group education class attendance to the selected participants. The check box will be enabled and initially checked when the Work with On-site Group dialog is active and the user has the appropriate permissions (NutritionEducation.Add or FullControl) to credit group education class attendance. If the user does not have the appropriate permissions, this control will be disabled. When the mark is removed from this control, the Group Education Class dropdown box will be disabled and the group contact type dropdown will be set to blank.

6.4.1.3 Group Contact Type Dropdown (Type)

This control allows the user to select the type of group nutrition education class for which the selected participants should receive credit. The dropdown will be enabled when the Credit Group Education Class check box is marked and an on-site household member is selected in the Household Members On-site grid. It will display a list of group nutrition education contact types from the reference dictionary table of the lookup database and it will default to “Secondary”.

6.4.1.4 Topics Discussed List Box

This control allows the user to select the topics covered at the group nutrition education contact. The list box will be enabled when the Credit Group Education Class check box is marked and an on-site household member is marked to "Include". The list box allows the selection of multiple items. Topics included will be determined by your state. It will display a list of group nutrition education topics from the EducationTopics table for contact method group and the selection from the group contact type dropdown.

6.4.1.5 Issue Checks Check Box

This control allows the user to specify whether checks should be produced for the eligible participants selected. The check box will be enabled and initially checked when the Work with On-site Group dialog is active and the user has the appropriate permissions (CheckIssuance.Add or Full Control) to create food instruments. If the user does not have the appropriate permissions, this control will be disabled. Upon removing the check mark from the Issue Checks check box the Mailing Checks check box will be cleared and disabled.

6.4.1.6 Mailing Checks Check Box

This control allows the user to specify that mailing labels should be produced for the participants who receive checks. The check box will be enabled when the Issue Checks check box is marked. Upon removing the check mark from this control and the Generate Official Notification check box, the following controls will be cleared and disabled:

- Address Label Printer dropdown
- Label Type dropdown
- Starting Label Position text box
- Generate Address Label(s) First
- Pause after Generating Label

6.4.1.7 Generate Official Notification

This control allows the user to specify that official notifications should be produced for the participants who fit the criteria for those notices. The check box will be enabled when the Work with On-site Group dialog is active. Upon removing the check mark from the Generate Official Notification check box, the following controls will be cleared and disabled:

- Notice Type radio button group
- Generate Address Label(s) First check box

6.4.1.8 Notice Type Radio Button Group

The radio button group will be enabled when the Generate Official Notification check box is marked. It consists of the following radio buttons:

- Letter
- Post Card

6.4.1.9 Generate Address Label(s) First Check Box

This control allows the user to specify that address labels should be produced for the participants who receive official notifications. The check box will be enabled when the Generate Official Notification check box is marked. Upon removing the check mark from this control and the Mailing Checks check box, the following controls will be cleared and disabled:

- Address Label Printer dropdown
- Label Type dropdown
- Starting Label Position text box
- Generate Address Label(s) First
- Pause after Generating Label

6.4.1.10 Address Label Printer Dropdown

The dropdown will be enabled when the Mailing Checks check box or the Generate Official Notification check box is marked and the Generate Address Label(s) First check box is checked. The dropdown will display an entry for each defined label or other output printer for the system that is currently active. When enabled, the field will default to blank. The Address Label Printer dropdown will be disabled when the check mark is removed from both the Mailing Checks check box and the Generate Official Notification check box.

6.4.1.11 Label Type Dropdown

The dropdown will be enabled when a printer is selected from the Address Label Printer dropdown. It will contain a list of label types from the ReferenceDictionary entity where Category equals 'LaserLabels'.

6.4.1.12 Starting Label Position Text Box

The control will be enabled when a laser printer is selected in the Address Label Printer dropdown. The control allows entry of numeric digits. The minimum value is 1 and the maximum value is the number of labels available on the selected label type.

6.4.1.13 Pause after Generating Label Check Box

The check box allows the user to request a pause for paper change after generating labels. The control will be enabled when the Generate Address Label(s) First check box is marked. It will be disabled and cleared when the Generate Address Label(s) First check box is unchecked.

6.4.1.14 OK Button

This control allows the user to activate the requested function(s) and invoke the Event Log for Work with On-site Group. The OK button will be enabled when the Work with On-site Group dialog is active. Characteristics of the OK button are defined in *Consistencies*.

6.4.1.15 Cancel Button

This control allows the user to exit the Work with On-site Group dialog without performing any functions. It will not, however, undo changes made via the Apply button. The Cancel button will be enabled when the Work with On-site Group dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

6.4.1.16 Apply Button

This control allows the user to perform the selected functions without exiting the Work with On-site Group dialog. The Apply button will be enabled when the Work with On-site Group dialog is active. It has a mnemonic of 'A'.

6.4.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Work with On-site Group dialog.

6.4.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar will be set to "Work with On-site Group"

The Household Members grid will display an entry for each participant (Member.StateWICID) (Member.FirstName Member.MiddleInitial. Member.LastName) who has a completed certification or certification attempt and has been marked on site (Member.OnPremesisTime) and will be sorted first by Household ID then by Date of Birth. If more than one member of the household is marked on-site, the oldest member will be displayed first and the other household members will display indented. For each participant that has been marked as On-site, all household members will also be displayed in the grid regardless of their own On-site status.

If no participants are found as being marked on-site the dialog will be displayed with an empty list and the OK and Apply buttons will be disabled.

If the user has the appropriate permissions (NutritionEducation.Add or FullControl) to credit group education class attendance, the Credit Group Education Class check box will be enabled and initially checked. Otherwise it will be disabled and un-checked.

The Group Contact Type dropdown will be enabled and default to “Secondary” if the Credit Group Education Class check box is initially enabled and checked and an on-site household member is marked to “Include”. Otherwise, it will be disabled and blank.

The Topics Discussed list box will be enabled if the Credit Group Education Class check box is initially enabled and checked. Otherwise, it will be disabled.

If the user has the appropriate permissions (CheckIssuance.Add or FullControl) to issue checks, the Issue Checks check box will be initially enabled and checked. Otherwise it will be disabled an un-checked.

The Mailing Checks check box will be initially enabled and un-checked.

The Generate Official Notification check box will be initially enabled and un-checked.

The Notice Type radio button group will be disabled and no radio button will be selected.

The Generate Address Labels check box will be initially disabled and un-checked.

The Address Label Printer dropdown will be disabled and blank.

The Label Type dropdown will be disabled and blank.

The Starting Label Position text box will be disabled and blank.

The Pause after Generating Label check box will be disabled and blank.

6.4.2.2 Edits

Upon selection of the OK or Apply buttons, the system will check for required information, a selection is required for at least one entry in the list. If a selection is not made in the Include column of the Households On-site grid, the system will invoke a standard error message with the text "At least one household in the Household Members On-site table must be marked as Include."

If no entry is made in the Credit Group Education Class check box, the Issue Checks check box or the Generate Official Notification check box the system will invoke a standard error message with the text "An entry is required for at least one of the following: Credit Group Education Class, Issue Checks or Generate Official Notification".

If the Group Education Class check box is marked and a selection is not made in the Group Contact Type dropdown box, the system will invoke a standard error message with the text "A selection is required for the Group Contact Type."

If the Group Education Class check box is marked and a selection is not made in the Topics Discussed list box, the system will invoke a standard error message with the text "A selection is required in the Topics Discussed."

If the Generate Official Notification check box is marked and a selection is not made in the Notice Type radio button group, the system will invoke a standard error message with the text "A selection is required in the {control label}."

The system will invoke a standard error message with the text, "A selection is required in the {control label}." if the Mailing Checks check box or the Generate Address Labels check box is selected and a selection is not made in the following:

- Address Label Printer dropdown
- Label Type dropdown

If a laser printer is selected from the Address Label Printer dropdown, and a selection is not made in the Starting Label Position text box, the system will invoke a standard error message with the text "An entry is required for the Starting Label Position."

If the value entered in the Starting Label Position text box is greater than the number of labels available on the selected label type, the system will invoke a standard error message with the text "Starting Label range is 1 through xx." where xx is the number of labels available on the selected label type.

6.4.2.3 Saving the Data

Upon successful completion of the above listed edits, if the Credit Group Education Class check box is checked, the system will credit **only** the selected (marked to include) members, with a group nutrition education contact for the current system day and the topic of the group education class selected in the Group Education Class dropdown box. The system will update the EducationContact entity with the following:

- StateWICID - A record will be added for all participants selected in the Household Members On-site grid.
- ContactDate - Set to the current system date
- ContactMethod - Set to the ReferenceDictionary.ExternalID where the ReferenceDictionary.Category = 'NEMETHOD' and the ReferenceDictionary.Description = 'Group'.
- ContactType - Set to the value of the Group Contact Type dropdown box.

The system will also update the EducationContactItem entity with the following:

- StateWICID - A record will be added for all participants selected in the Household Members On-site grid and each topic selected in the Topics Discussed list box.
- ContactDate - Set to the current system date
- ContactMethod - Set to the ReferenceDictionary.ExternalID where the ReferenceDictionary.Category = 'NEMETHOD' and the ReferenceDictionary.Description = 'Group'.
- ContactType - Set to the value of the Group Contact Type dropdown box.
- TopicCD - Set to the value of the topic selected in the Topics Discussed list box.

If a group education class has already been recorded for the selected StateWICID for this date, the group education class will not be recorded for the participant and a message will be written to the Event Log for Work with On-site Group with the text: "Participant {StateWICID} - Only one group education contact is allowed per day. A group education contact for today already exists for this participant."

Upon completion, the system will invoke the Event Log - Work with On-site Group dialog. Once the Work with On-site Group Event Log dialog is closed, the system will return to the Work with On-site Group dialog. At this point, all individuals previously marked to include in the grid will be automatically unmarked.

If the Apply button was selected the system will allow the user to perform more functions on the list of participants.

If the OK button was selected the system reacts exactly as described above with the exception that the Work with On-site Group dialog immediately closes and the system will return to the Participant List Window.

If the Issue Checks check box is checked, the system will produce food instruments for **all** members of the household who are eligible for checks **and** have at least one member marked for inclusion in the grid. (This includes all household members regardless of their On-site status.) Refer to Issue Checks for Participants of On-site Households process in Clinic – Chapter 11 – Food Instrument Production.

If the Mailing Checks check box is also checked, the system will generate address labels. The criteria for generating these address labels and the format of the labels is described in this document.

Upon completion of the check production process, the system will invoke the Event Log - Work with On-site Group dialog. Once the Work with On-site Group Event Log dialog is closed, the system will return to the Work with On-site Group dialog.

When complete, this process will uncheck the Include column for all participants who had been previously marked. Also the issuance of checks will set household members as no longer on-site. The list invoked will remain the same until the user closes the Work with On-site Group dialog. This avoids the possible confusion of names being rearranged and gives the user a consistent group listing.

If the Apply button was selected the system will allow the user to perform more functions on the list of participants.

If the OK button was selected the system reacts exactly as described above with the exception that the Work with On-site Group dialog immediately closes upon completion and the system will return to the Participant List Window.

If the Generate Official Notification check box is checked, the system will generate an official notification for **all** members of the household who will be terminated by automatic means within 15 days of the current system date **and** have at least one member marked for inclusion in the grid. This includes all household members regardless of their On-site status. The criteria for generating these notices and the format of the notices are described in *Chapter 13 – System Outputs*.

If the Generate Address Labels check box is also checked, the system will generate address labels. The criteria for generating these address labels and the format of the labels is described in Chapter 13 – System Outputs.

Upon completion of the check production process, the system will invoke the Event Log - Work with On-site Group dialog. Once the Work with On-site Group Event Log dialog is closed, the system will return to the Work with On-site Group dialog. At this point, all individuals previously marked to include in the grid will be automatically unmarked.

If the Apply button was selected the system will allow the user to perform more functions on the list of participants.

If the OK button was selected the system reacts exactly as described above with the exception that the Work with On-site Group dialog immediately closes upon completion and the system will return to the Participant List Window.

6.4.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Work with On-site Group (Member) dialog and return to the Participant List Window.

6.5 View Event Log for Work with On-site Group

The Event Log – Work with On-site Group dialog allows the user to view the event log resulting from processes invoked by the Work with On-site Group dialog. It will also allow the user to print the event log. This dialog is invoked at the completion of the Work with On-site Group process described previously in this document.

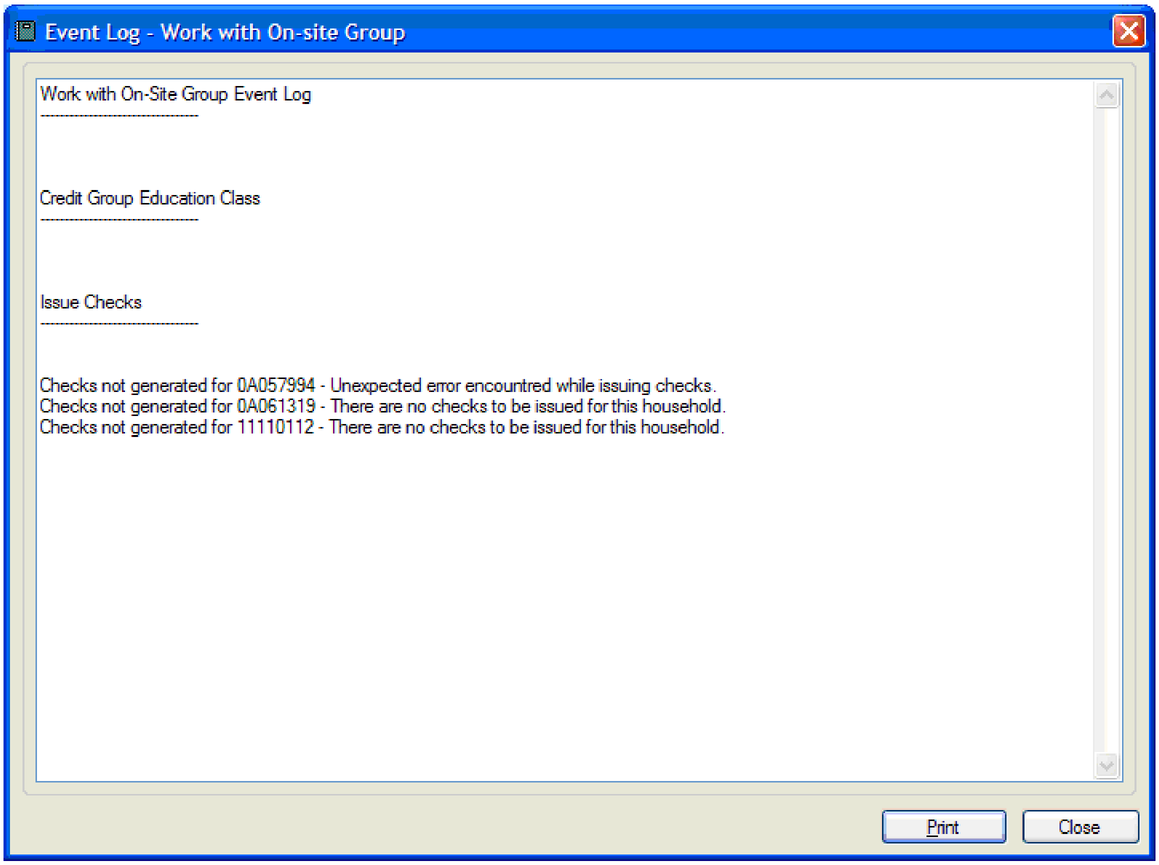


Figure 15 - Event Log – Work with On-site Group Dialog

6.5.1 Controls

This section describes the behavior of the controls on the Event Log – Work with On-site Group dialog.

6.5.1.1 Event Log Text Box

This control allows the user to view the record of events and errors that occurred as a result of the Work with On-site Group processes. The text box will be enabled when the Event Log – Work with On-site Group dialog is active. The contents of the control are read-only. When the text exceeds the bounds of the text box, a vertical scroll bar will invoke.

6.5.1.2 Print Button

This control allows the user to print the event log entries in the Event Log text box. The Print button will be enabled when the Event Log – Work with On-site Group dialog is active and an Other Output Printer has been defined for the workstation. The button has a mnemonic of 'P'.

6.5.1.3 Close Button

This control allows the user to exit the Event Log – Work with On-site Group dialog and return to the Work with On-site Group dialog. The Close button will be enabled when the Event Log – Work with On-site Group dialog is active. Characteristics for the Close button are defined in *Consistencies*.

6.5.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Event Log – Work with On-site Group dialog.

6.5.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text is set to "Event Log – Work with On-site Group"

The Event text box displays the content of the events that occurred as a result of the Work with On-site Group dialog. (Credit Group Class, Issue Checks)

6.5.2.2 Print

Upon selection of the Print button, the system will print the contents of the event log to the currently defined other output printer.

6.5.2.3 Close

Upon selection of the Close button, if this dialog was invoked as a result of selecting the Apply button on the Work with On-site Group dialog, the system will dismiss the Event Log – Work with On-site Group dialog and return to the Work with On-site Group dialog. Upon returning to the Work with On-site Group dialog, this system will uncheck the Include column for all participants who had been previously marked. Participants who were issued checks as a result of this process will be set as no longer on-site. The list invoked will remain the same until the user closes the Work with On-site Group dialog. This avoids the possible confusion of names being rearranged and gives the user a consistent group listing.

If this dialog was invoked as a result of selecting the OK button on the Work with On-site Group dialog, the system will dismiss the Event Log – Work with On-site Group dialog and return to the Participant List Window.

6.6 View Participant Transfer History

This dialog allows the user to view the participants that were transferred out of their agency and match the selected criteria. It is invoked when the user selects the View Participant Transfer History menu item from the Activities menu.

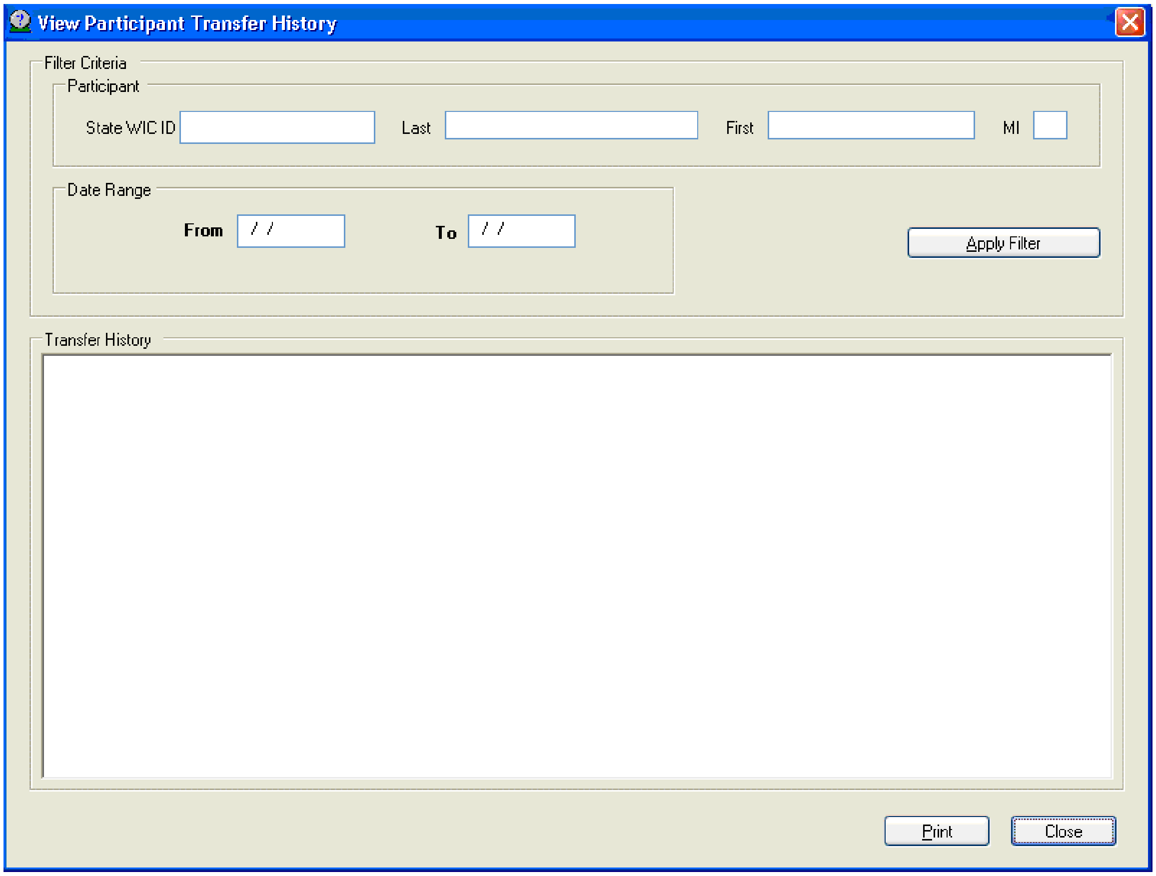


Figure 16 – View Participant Transfer History

6.6.1 Controls

This section describes the behavior of the controls on the View Participant Transfer History dialog.

6.6.1.1 State WIC ID Masked Edit Box

This control allows the user to enter the State WIC ID as part of the filter criteria. The masked edit box will be enabled when the View Participant Transfer History dialog is active. The masked edit box will only allow entry of alphanumeric characters. The mask for the box will be "#########". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

6.6.1.2 Last Name Text Box

This control allows the user to enter all or part of the last name as part of the filter criteria. The text box will be enabled when the View Participant Transfer History dialog is active. The value entered in the Last Name text box must only include the characters A-Z, {space}, and the following characters (**' . , -**). It will convert alpha characters to upper case. The maximum size of this control will be twenty-five (25) characters.

6.6.1.3 First Name Text Box

This control allows the user to enter all or part of the first name as part of the filter criteria. The text box will be enabled when the View Participant Transfer History dialog is active. The value entered in the First Name text box must only include the characters A-Z, {space}, and the following characters (**' . , -**). It will convert alpha characters to upper case. The maximum size of this control will be twenty (20) characters.

6.6.1.4 Middle Initial Text Box (MI)

This control allows the user to enter the middle initial as part of the filter criteria. The text box will be enabled when the View Participant Transfer History dialog is active. The value entered in the Middle Initial text box must only include the characters A-Z. It will convert alpha characters to upper case. The maximum size of this control will be one (1) character.

6.6.1.5 Date Range From Masked Edit Box (From)

This control allows the user to enter the start date of the date range on which to filter the participant transfer history. The masked edit box will be enabled when the View Participant Transfer History dialog is active. It will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four digit year.

6.6.1.6 Date Range To Masked Edit Box (To)

This control allows the user to specify the end date of the date range on which to filter the participant transfer history. The masked edit box will be enabled when the View Participant Transfer History dialog is active. It will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four digit year.

6.6.1.7 Apply Filter Button

This control allows the user to apply the selected filter criteria and populate the Transfer History grid. The button will be enabled when the View Participant Transfer History dialog is active. It has a mnemonic of 'A'.

6.6.1.8 Transfer History Grid

This control allows the user to view the participant transfer history that matches the entered criteria.

The grid contains the following columns:

- Transfer Date/Time
- State WIC ID
- Participant Name
- Agency and Clinic Transferred From (From)
- Agency and Clinic Transferred To (To)
- Staff ID

The grid will contain an entry for each participant transferred out of the user's agency that matches the selected filter criteria. The entries will be sorted in ascending order according to the value of the Transfer Date/Time column. The data in the grid is read-only.

6.6.1.9 Print Button

This control allows the user to print the Participant Transfer History report for the selected filter criteria. The button will be enabled when the View Participant Transfer History dialog is active and there is at least one entry displayed in the list. It has a mnemonic of 'P'.

6.6.1.10 Close Button

This control allows the user to exit the View Participant Transfer History dialog and return to the calling dialog. The button will be enabled when the View Participant Transfer History dialog is active. Characteristics for the Close button are defined in *Consistencies*.

6.6.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the View Participant Transfer History dialog.

6.6.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "View Participant Transfer History"

All controls on this dialog will initially be blank.

The Transfer History grid will initially be blank.

6.6.2.2 Edits

Upon selection of the Apply Filter button, the system will check for Required Information.

If an entry is not made in at least one of the following controls:

- State WIC ID masked edit box
- Last Name text box
- First Name text box
- Middle Initial text box
- Date Range From masked edit box
- Date Range To masked edit box

The system will invoke a standard error message with the text "The State WIC ID, Last Name, First Name, Middle Initial or a date range must be entered before a filter can be applied."

If the date entered in a Date field is greater than the current system date, the system will invoke a standard error message with the text "Date entered must be less than or equal to today's date."

If an invalid date is entered in a Date field, the system will invoke a standard error message with the text "Invalid date entered."

If an entry is made in the Date Range From and not the Date Range To, the system will invoke a standard error message with the text "An entry is required for the To Date."

If an entry is made in the Date Range To and not the Date Range From, the system will invoke a standard error message with the text "An entry is required for the From Date."

If the Date Range From is greater than the Date Range To, the system will invoke a standard error message with the text "Beginning of date range must be equal to or less than end of date range."

6.6.2.3 Display Transfer History

Upon successful completion of the above listed edits, the system will search for information matching the filter criteria

The system will display the results in the Transfer History grid.

If there is no information matching the selected filter criteria, a standard system message box is invoked with the text, "No information was found matching the search criteria." Upon dismissal of the message box, the user is returned to the View Participant Transfer History dialog.

6.6.2.4 Print

Upon selection of the Print button, the system will print the Participant Transfer History report described in this document to the selected other output printer (see System Tools).

6.6.2.5 Close

Upon selection of the Close button, the system will dismiss the View Participant Transfer History dialog and return to the Participant List Window.

6.7 Record Replacement Item

The Record Replacement Item dialog is described in *Chapter 08 - Participant Search, Folder and Summary(SO).doc*.

The Record Replacement Item dialog allows the user to record that a replacement breastpump was received from the manufacturer to replace one that was damaged. The Record Replacement Item dialog is invoked when the user selects the Record Replacement Item Menu Item from the Activities menu either in the State Office application or the Clinic application.

6.8 Participant Transfer History (Output)

The user may generate the Participant Transfer History report from the View Participant Transfer History dialog. It lists the participant transfers that were invoked on the View Participant Transfer History dialog.

```
                                   <State Name Department of Health>                           Run Date: XX/XX/XXXX
                                     Participant Transfer History                              Run Time:   XX:XX:XX
                                                                                   Page:           XXX

                                                                              From          To
Transfer Date/Time     State WIC ID     Participant Name                      Clinic        Clinic          Staff ID

02/10/2004  15:49      12245564         WILLIAMS, MARY N.                     01/01         12/02           CHENLEY
02/12/2004  09:37      12244000         BROWN, JOHN J.                        01/32         32/01           CHENLEY

              *** End of Listing ***
```

6.8.1 Data Elements

This section describes the data elements that will print on the document.

6.8.1.1 Report Title

The title of the report will be the page heading of all reports. The subtitle of the report will be the text "Participant Transfer History".

6.8.1.1.1 Origin of Data Elements

The title of the report will be the value of the *ReportHeading* business rule.

6.8.1.1.2 Format

The value will print as its literal value.

6.8.1.2 Transfer Date/Time

This value will be the date that the participant transfer occurred.

6.8.1.2.1 Origin of Data Element

These values come from the EffectiveDate and EffectiveTime attributes of the TRANSFER-HISTORY entity.

6.8.1.2.2 Format

The date value will print in MM/DD/CCYY format. The time value will print in HH:MM 24-hour format.

6.8.1.3 State WIC ID

This value will be the State WIC ID of the participant.

6.8.1.3.1 Origin of Data Element

The value will be taken from the StateWICID attribute of the TRANSFER-HISTORY entity.

6.8.1.3.2 Format

The value will print as its literal value.

6.8.1.4 Participant Name

This value will be the full name of the participant that was transferred.

6.8.1.4.1 Origin of Data Element

The value will be taken from the LastName, FirstName and MiddleInitial attributes of the MEMBER entity for the participant.

6.8.1.4.2 Format

The value will print in {last name}, {first name} {middle initial}. format.

6.8.1.5 From Clinic

This value will be the clinic were the participant received services before the transfer.

6.8.1.5.1 Origin of Data Element

These values come from the FromAgencyID and FromServiceSiteID attributes of the TRANSFER-HISTORY entity.

6.8.1.5.2 Format

The values will print in ##/## format.

6.8.1.6 To Clinic

This value will be the clinic where the participant belongs after the transfer.

6.8.1.6.1 Origin of Data Element

These values come from the ToAgencyID and ToServiceSiteID attributes of the TRANSFER-HISTORY entity.

6.8.1.6.2 Format

The values will print in ##/## format.

6.8.1.7 Staff ID

This value will be the Staff ID of the clinic user who transferred the participant.

6.8.1.7.1 Origin of Data Element

The value will be taken from the StaffID attribute of the TRANSFER-HISTORY entity.

6.8.1.7.2 Format

The value will print as its literal value.

6.8.2 Filter Criteria

6.8.2.1 Participant Transfers Matching Selected Criteria

Only participants transferred out of the user's clinic that match the filter criteria selected on the View Participant Transfer History dialog will be included in the report. This will be determined by examining the attributes of the TRANSFER-HISTORY and MEMBER entities.

6.8.3 Sort Order

6.8.3.1 Transfer Date

The report will be sorted first by transfer date.

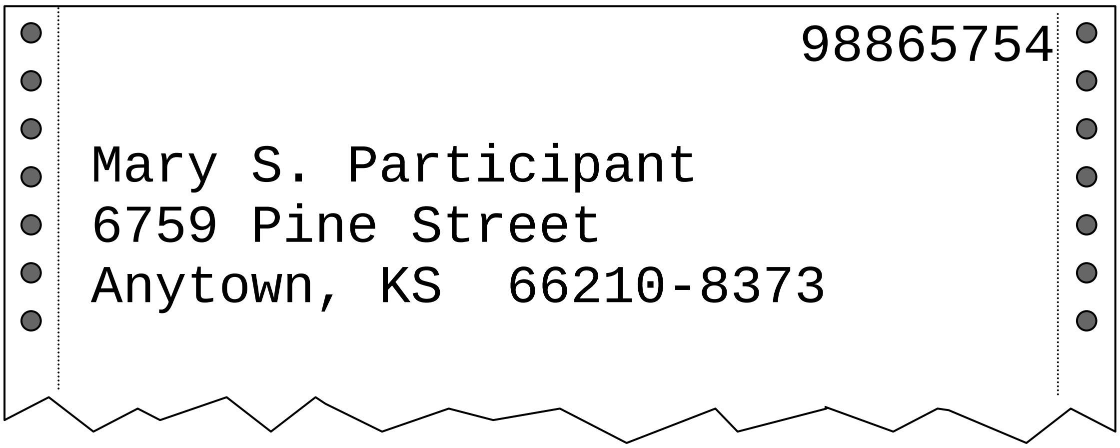
6.8.3.2 Transfer Time

The report will be sorted by transfer time within the transfer date.

6.9 Address Labels for Mailing Checks (Output)

Address labels may be produced for all clients who will receive checks for mailing purposes.

Address Labels for Mailing Checks



6.9.1 Data Elements

This section describes the data elements that will print on the document.

6.9.1.1 Client State WIC ID

This value will be the State WIC ID of the client who will receive checks.

6.9.1.1.1 Origin of Data Element

The value will be taken from the State-WIC-Identifier attribute of the MEMBER entity of the client.

6.9.1.1.2 Format

The value will print as its literal value.

6.9.1.2 Client Name

This value will be the full name of the client.

6.9.1.2.1 Origin of Data Element

The value will be taken from the Last-Name, First-Name and Middle-Initial attributes of the MEMBER entity of the client.

6.9.1.2.2 Format

The value will print in {first name} {middle initial}. {last name} format.

6.9.1.3 Client Mailing Address

This value will be the mailing address of the household of the client.

6.9.1.3.1 Origin of Data Element

The value will be taken from the Mail-Address of the HOUSEHOLD entity of the client.

6.9.1.3.2 Format

The value will print as its literal value.

6.9.1.4 Client Mailing City

This value will be the mailing city of the household of the client.

6.9.1.4.1 Origin of Data Element

The value will be taken from the Mail-City of the HOUSEHOLD entity of the client.

6.9.1.4.2 Format

The value will print as its literal value.

6.9.1.5 Client Mailing State

This value will be the mailing state of the household of the client.

6.9.1.5.1 Origin of Data Element

The value will be taken from the Mail-State attribute of the HOUSEHOLD entity of the client.

6.9.1.5.2 Format

The value will print as its literal value.

6.9.1.6 Client Mailing ZIP Code

This value will be the mailing ZIP code of the household of the client.

6.9.1.6.1 Origin of Data Element

The value will be taken from the Mail-ZIP-Code attribute of the HOUSEHOLD entity of the client.

6.9.1.6.2 Format

The value will print in #####-#### format.

6.9.2 Filter Criteria

6.9.2.1 Receiving Checks

The system will generate address labels for all clients who will receive checks.

6.9.2.2 Household

Only one address label will be produced per household when checks are issued for multiple members of the same household.

6.9.3 Sort Order

6.9.3.1 Full Name

The address labels will be generated in the last name, first name, middle initial order.

6.9.4 Control Breaks

No control breaks are defined for the address labels.